



IOWAccess Advisory Council

IOWAccess Revolving Fund Project Application

Proposing agencies should complete and submit Parts I, II and III to request Planning approval, then complete and submit Parts IV and V to request Execution approval.

Part I - Project Information

Date:	31 August 2009
Agency Name:	State Historical Society of Iowa
Project Name:	Museum Content Management System
Agency Manager:	Jodi Evans
Agency Manager Phone Number / E-Mail:	515-281-3295 jodi.evans@iowa.gov
Executive Sponsor (Agency Director or Designee):	Mary Jane Olney
Initial Total for Planning:	\$ 0
Initial Total for Execution:	\$ 20,235
Initial Total for all Phases of Project, if Multi-Phased:	\$ 20,235
Project Timeline: (estimate start and end dates for project spending)	Planning Start Date: completed Planning End Date: completed Execution Start Date: January 2010 Execution End Date: April 1, 2010
Revised Total for Planning and Execution:	\$ 20,235
Revised Total for all Phases of Project, if Multi-Phased:	\$ 20,235

Part II - Project Overview

A. Project Summary: Describe the nature and use of the proposed project, including what is to be accomplished, how it will be accomplished, and what the costs and benefits will be.

Response: The proposed project is to purchase a museum-specific content management system (CMS) designed to allow access to the museum catalog via the Internet. The CMS conforms to the latest industry standards for cataloguing museum collections, allowing capacity for descriptions and images of objects in the museum collections. Funding through an IOWA Access Grant will purchase the equipment and software necessary to: (1) efficiently create and manage digital images of collection items; (2) manage these newly created digital assets, and (3) combine collection information into an efficient, consistent, usable collection management system.

The State Museum holds nearly 110,000 objects in its collections, adding over 400 objects to the collections each year. Most objects are stored in Des Moines. Three of the 8 State Historical Society of Iowa (SHSI) historic sites maintain significant on-site collections: Montauk 11,000+; Edel Blacksmith 1500+; Plum Grove 700+. The SHSI Centennial Building in Iowa City holds over 2500 objects that have not been catalogued fully. None of these objects are available for public access by electronic means.

Nine museum staff will be networked into the CMS. These staffers - representing curatorial, registration, conservation and exhibition - will all be able to see the most current object content and images. Reports, lists, and plans generated through the CMS will be consistent. CMS web-based applications allow one person to do the work currently requiring the expertise of three or four individuals. Using an integrated CMS will decrease the time needed to catalogue, photograph, and upload content to the Web.

B. Strategic Plan: How does the proposed project fit into the strategic plan of the requesting agency?

Response: From the State Historical Society of Iowa Mission/Vision Statement:

Goal 1. Connect Iowans with their heritage - where they want it, when they want it and how they want it.

Strategy 1.b. Provide on-line access to State Historical Society of Iowa resources, programs and service.

The SHSI Vision and Mission Statements mandate that SHSI help Iowans connect to Iowa's past while serving as a trustee and advocate of historical information and education. Specific Goals of the Mission Statement include providing on-line access to SHSI resources. Use of on-line content in the museum community increases every day, as does the expectation by the general public that museums will provide an on-line service. The inability of the State Museum to put collection information on-line means more and more information is unavailable to the public it serves.

The project supports state government by helping SHSI maintain its collections in professionally appropriate conditions; increases SHSI's ability and capacity to store historical collections held in trust

for the public; expands provision of technical assistance to colleagues throughout the state; and continues to develop SHSI collections to assure thorough documentation of Iowa's historical resources.

C. Current Technology: Provide a summary of the technology used by the current system. How does the proposed project impact the agency's technological direction? Are programming elements consistent with a Service Oriented Architecture (SOA) approach? Are programming elements consistent with existing enterprise standards?

Response: Collection content is currently managed using paper files and several MS-ACCESS databases. While ACCESS is a powerful tool, it is just a database. No one on the Museum staff has the expertise to move beyond simple database utilities. Purchase of museum-specific CMS will provide efficient, structured management of information content and digital assets.

Access to collection information on-line will require images of objects as well as ordered, coherent descriptions of those objects. While the museum has descriptions of most objects, without images these descriptions aren't very useful on-line. Creation of the images without the means to manage content results in a time-consuming piece-meal approach to getting images on-line. Combining images with content in one integrated system allows researchers to find and download what they want.

Past considerations of on-line access have been constrained by the lack of an integrated system and the lack of adequate server space. Collection objects have been prioritized for photography according to those objects that are fragile, valuable, popular, and possess a certain 'wow' factor.

The project funding request also includes money to purchase a camera needed to create digital images, a server and supporting software capable of storing images and information, a computer upgrade for the Project Manager (museum registrar) and possible upgrades for museum staff most directly involved with creating collection information. The need for server space and software is negotiable, pending an assessment of the current capabilities and future needs with regards to this project.

The components of the chosen CMS - PastPerfect - include:

the Basic Program;

Version 4.0 Upgrade;

Network upgrade for multiple users;

Scatter/Gather;

conversion of existing records to PastPerfect;

training CD;

Multi-Media add-on;

PastPerfect Online hosting of collection records.

Additional expenses will be annual support for up to ten (10) users.

The chosen CMS - Past Perfect - is a proven technology, used by hundreds of museums around the country. The greatest benefit of Past Perfect is that it combines all the functions of museum collection management into one integrated system.

These technological improvements will subsequently help SHSI serve Iowans in a more timely and efficient manner. Iowans use the SHSI collection of artifacts in numerous capacities: research for primary, secondary, undergraduate and post-graduate academic pursuits; genealogical research; museum exhibits; and more.

Artifact stories and information provide historical context that connects Iowans to their past and paves the way to their future. The purchase of a digital SLR camera/software, a dedicated server/software, a museum-specific Content Management System (CMS), and upgrades to existing computers will significantly improve the creation of usable, deliverable content available to anyone interested in the collections of the State Historical Society of Iowa. The project enhances the quality of life for all Iowans by making Iowa's historical artifacts more readily available to Iowans via digital archival technologies.

D. Statutory or Other Requirements

Is this project or expenditure necessary for compliance with a Federal law, rule, or order?

YES (If "Yes", cite the specific Federal law, rule or order, with a short explanation of how this project is impacted by it.)

Response: N/A

Is this project or expenditure required by state law, rule or order?

YES (If "YES", cite the specific state law, rule or order, with a short explanation of how this project is impacted by it.)

Response: N/A

Does this project or expenditure meet a health, safety or security requirement?

YES (If "YES", explain.)

Response: N/A

Is this project or expenditure necessary for compliance with an enterprise technology standard?

YES (If "YES", cite the specific standard.)

Response: N/A

[This section to be scored by application evaluator.]

Requirements/Compliance Evaluation (15 Points Maximum)

If the answer to these criteria is "no," the point value is zero (0). Depending upon how directly a qualifying project or expenditure may relate to a particular requirement (federal mandate, state mandate, health-safety-security issue, or compliance with an enterprise technology standard), or satisfies more than one requirement (e.g. it is mandated by state and federal law and fulfills a health and safety mandate), 1-15 points awarded.



E. Impact on Iowa's Citizens

1. Project Participants - List the project participants (i.e. single agency, multiple agencies, State government enterprise, citizens, associations, or businesses, other levels of government, etc.) and provide commentary concerning the nature of participant involvement. Be sure to specify who and how many **direct** users the system will impact. Also specify whether the system will be of use to other interested parties: who they may be, how many people are estimated, and how they will use the system.

Response: The overarching result of this project is to get the museum collection information out into the world. The citizens of Iowa, as the collection 'owners', are the first beneficiaries of this project; not only will they have access to 'their' collections, the reputation of their museum will be greatly enhanced. While this is a single-agency project, the richness of the museum collections will be appreciated by anyone with a connection to the World Wide Web.

Response time to researchers will be cut dramatically as more content is posted on-line. An integrated system with images will deliver content faster than the current process requiring contact with a staff member, piece-meal creation of images, and response to researchers via email attachments.

The Museum loans objects to other museums under controlled circumstances. Creating a public catalog will allow other museums to browse our collections, make their selections and start the loan process. Loans to other museums enhance the visibility of Iowa's rich history.

2. Service Improvements - Summarize the extent to which the project or expenditure improves service to Iowa citizens or within State government. Included would be such items as improving the quality of life, reducing the government hassle factor, providing enhanced services, improving work processes, etc.

Response: This project will replace a legacy system using MS-ACCESS and MS-WORD developed by a non-programmer in response to immediate job responsibilities. While the current database systems are adequate in managing the museum collection, they will not support the inclusion of images which is essential to on-line access of museum collections. Other museum-specific CMS have been considered but those systems are more expensive and more complicated. PastPerfect has been developed with smaller museums in mind (smaller staff, not necessarily smaller collections.) PastPerfect has also been developed specifically for history museums while other systems are designed for art or archeology collections.

Current museum collection management practices have been developed as the result of two *kaizan* events and a near-constant evaluation of methods and procedures weighed against available resources and the standards of the museum profession. Museum-specific content management system (CMS) will replace the 'look' of collection management and the procedures, but not the adherence to standards.

3. Citizen Impact – Summarize how the project leads to a more informed citizenry, facilitates accountability, and encourages participatory democracy. If this is an extension of another project, what has been the adoption rate of Iowa's citizens or government employees with the preceding project?

Response: Since the museum moved to the New Historical Building in 1988, people have been asking "where's all the stuff" - on-line content will allow viewing of those objects not on exhibition. On-line content means anyone with a connection to the WWW can access museum object information. On-line content means faster response time to casual information requests. The citizen has the control in accessing museum object information; most questions can be answered as the citizen browses.

The project falls somewhere between 'need' and 'nice to have': our public has indicated they want more access to museum objects and the State Historical Society of Iowa has committed to greater on-line content. Funding this project is a means to an end articulated by our public. On-line content is no longer the cutting edge in the museum profession - it is now a standard goal. Discussion of this project cannot disconnect the difference between citizen as beneficiary and enhancing the agency's ability to serve - the citizens want access to museum collections; on-line is the most efficient mechanism. State government agencies should provide a high operating standard; therefore the State Museum needs to be a leader in museum management, setting an example for operation of all Iowa museums.

4. Public Health and/or Safety – Explain requirements or impact on the health and safety of the public.

Response: Public Health/Safety. This project has no real impact on the health or safety of the public.

[This section to be scored by application evaluator.]

Impact Evaluation (15 Points Maximum)

- Minimally directly impacts Iowa citizens (0-5 points).
- Moderately directly impacts Iowa citizens (6-10 points).
- Significantly directly impacts Iowa citizens (11-15 points).



[This section to be scored by application evaluator.]

Customer Service Evaluation (10 Points Maximum)

- Minimally improves customer service (0-3 points).
- Moderately improves customer service (4-6 points).
- Significantly improves customer service (7-10 points).



F. Scope

Is this project the first part of a future, larger project?

- YES (If "YES", explain.) NO, it is a stand-alone project

Response: 1. This is a stand-alone project. Once the CMS is up and running, museum staff will refine existing policies and procedures to incorporate image creation and uploading, and maintenance of the on-line component.

Is this project a continuation of a previously begun project?

- YES (If "YES", explain.)

Response: the State Museum continues to manage collection object content to the highest professional standard using available technologies. This project is a refinement of those standards

[This section to be scored by application evaluator.]

Scope Evaluation (10 Points Maximum)

- This is the first year of a multi-year project / expenditure or project / expenditure duration is one year (0-5 points)
- The project / expenditure is of a multi-year nature and each annual component produces a definable and stand-alone outcome, result or product (2-8 points).
- This is beyond the first year of a multi-year project / expenditure (6-10 points)



The last part of this criteria involves rating the extent to which a project or expenditure is at an advanced stage of Execution and termination of the project / expenditure would waste previously invested resources.

G. Source of Funds

On a fiscal year basis, how much of the total project cost (\$ amount and %) would be absorbed by your agency from non-Pooled Technology/IOWAccess funds? If desired, provide additional comment / response below.

Response: Annual support for the PastPerfect network will be at least \$600 per year. If necessary, the Department of Cultural Affairs/State Historical Society of Iowa will absorb the cost of having a third-party host the on-line content

[This section to be scored by application evaluator.]

Funds Evaluation (5 Points Maximum)

- 0% (0 points)
- 1%-12% (1 point)
- 13%-25% (2 points)
- 25%-38% (3 points)
- 39%-50% (4 points)
- Over 50% (5 points)



Part III – Planning Proposal

Amount of Planning Funding Requested: \$ 0 planning phase has been completed

A. Process Reengineering

Provide a *pre-project or pre-expenditure* (before Execution) description of the impacted system or process. Be sure to include the procedures used to administer the impacted system or process and how citizens interact with the current system.

Response: The concept behind museum collections management is quite simple:

- Know what you have;
- Know who gave it to you;
- Know where you put it.

Everything else is technique.

Public interaction with collection is through the museum staff. The museum creates exhibitions which are the public face of the collections, but this access is limited to what is on exhibition. Staff are happy to search the collection records for any member of the public but this takes some time ranging from a few minutes to a few days, depending on the scope of the search and the need to produce documents and images.

Currently all content relating to individual museum objects is stored in paper files, printed Accession Books (accession is the museum term for accepting and recording an object into the permanent museum collection. An accession number is assigned to each object connecting the object to its donation and to associated documentation), and a MS-ACCESS database. All objects are processed into the collection using a consistent series of steps.

A paper file of each donation or loan transaction is made, containing correspondence, documents with original signatures, written descriptions of objects, notes relating to exhibition or conservation, and any other information relating to the objects or the transaction. These files are stored in vertical files in the Curatorial Offices.

Accession Records are printed each year in July for the previous calendar year. These lists include the Accession Number assigned to each object, description, source information, and date of acquisition.

Below is a brief history of the format for these books:

- 1911 to 1939 Typewritten pages in post-bound covers. Some collections handwritten in commercial ledgers.
- 1939-1994 typewritten entries in commercial post-bound ledgers.
- 1995-2006 Discontinue ledgers. Object information re-keyed into WORD document and printed.
- 2007-present Object information cut from database and pasted into WORD document, then printed.

While the museum has been using computer technologies since 1989, limitations in the operating systems made extensive use of these technologies difficult. Character limits in the database allowed very little input of information. The database was merely a finding aid for the manual card catalog. Upgrades in the operating systems allowing for more use of memo-type fields has made the card catalog redundant. In 2002 the Registrar changed the description field in the DB from 56 characters to memo and began transcribing all available object information into the DB. Use of catalog cards was discontinued in 2003 in favor of using the database as the main source of object information.

Museum staff have access to the database but rarely add or change information themselves. Changes are submitted to the museum Registrar who cuts-and-pastes this information into the database and completes the DB record. It is simply the fragility of the current DB that makes this procedure necessary. MS-ACCESS is not very forgiving in correcting simple keystroke mistakes. The Registrar has built and maintained the DB through various operating system changes and is the staffer most familiar with its capabilities and problems. The DB is backed-up consistently as part of the State network.

Object images exist in many formats - b/w prints, color prints and slides, color transparencies, contact sheets, etc. The museum has never committed to a consistent photography procedure mainly due to lack of resources in creating and managing the images. These available images are stored in vertical files arranged by accession number.

Conservation information is created and managed by the Museum Conservator using an electronic system developed specifically for conservation. The conservator is the only staffer using this system and it is not networked within the Museum. Conservation information for specific objects can be linked to the documentation for those objects but only by request and in paper format.

Transaction documents such as the Deed of Gift and Loan Agreements are generated by the Registrar as-needed. These documents are in WORD and are over-written with each new transaction. Original documents with signatures are kept in the paper files. The maintenance of paper files is a museum profession standard and will not be completely discontinued with the advent of new technology.

The current system of managing museum collections in-house is adequate but not efficient. It is completely inadequate for on-line applications. The accession number of each object links that object with any associated information but the information is generated in many formats. Individual staffers may spend an inordinate amount of time searching those formats and still miss important information simply because the formats are not centralized. .

Provide a *post-project or post-expenditure* (after Execution) description of the impacted system or process. Be sure to include the procedures used to administer the impacted system or process and how citizens will interact with the proposed system. In particular, note if the project or expenditure makes use of information technology in reengineering traditional government processes.

Response: For the public, the main difference post-project will be: (1) an opportunity to actually interact with the museum collection information and, (2) the ability manage that interaction personally. Anyone with a connection to the Internet can search the museum collection at their convenience. The PP-Online tutorial creates the online catalog, indexes a sitemap, and delivers monthly visitor stats. Data from this stat feature will help in redefining a digitization strategy. Site visitor feedback will drive refinements to the online presence.

The SHSI website receives an average of 13,500 hits each month. Roughly half of these hits are for simple visitor information. Based in time spent by citizens on our website, we believe the remaining 80,000 people could be researching the museum collections.

With the purchase of a museum-specific Content Management System and associated equipment upgrades, as well as the purchase of a digital camera, the staff of the State Museum will be better equipped to manage the museum collection resulting in better response to public inquiries.

Museum collection information will be centralized using a relational program capable of managing information and images. Once the existing DB has been converted to PastPerfect (PP) individual museum staff will have access to the various information screens related to their areas of expertise, i.e. conservation, exhibition, object information, etc. Using fields and records from this main catalog, the Museum will use PastPerfect-Online to create a fully searchable online catalog linked through the SHSI website. This online presence will be derived from the main catalog and will not affect day-to-day management of the museum collections.

PastPerfect staff will convert the existing collection database, freeing museum staff from re-keying that information. Once the system is up and running, all staff networked into PP will use the same templates for reports, documents, or lists, eliminating the need to cut-and-paste between WORD and ACCESS. All networked staff will have read-rights to the catalog allowing all staff to see additions or corrections in real-time. Protocols will be placed detailing the rights and responsibilities among staff; very little change is expected in this area.

Once the conversion and editing phases are complete, the first phase of both the main catalog and the on-line catalog will contain narrative descriptions for the nearly 75,000 objects currently in the MS-ACCESS database. Museum staff will create a procedure and priority list to photograph and upload images to PP. Current images will be digitized to conform to PastPerfect's standards, ready for uploading.

Switching to a CMS will not drastically affect the content of museum collection management. Objects destined for the collection will still be processed with a consistent procedure. Staff will still be able to create lists, reports, and research. The main difference will be in the 'look' of collection management. Staff will be working within the parameters of an established system. As no one on the museum staff is attached to the 'old' method, the learning curve should be quite shallow.

[This section to be scored by application evaluator.]

Reengineering Evaluation (10 Points Maximum)

- Minimal use of information technology to reengineer government processes (0-3 points).
- Moderate use of information technology to reengineer government processes (4-6 points).
- Significant use of information technology to reengineer government processes (7-10).



B. Timeline

Provide a projected timeline for the Planning phase of the project. Include such items as **start date, projected end date**, planning, and database Planning. Also include the parties responsible for each item.

The planning for this project has been completed. Museum staff began researching CMS in 2007 and committed to PastPerfect as the best CMS for the State Museum in 2008.

[This section to be scored by application evaluator.]

Planning Timeline Evaluation (10 Points Maximum)

- The timeline contains several problem areas (0-3 points).
- The timeline seems reasonable with few problem areas (4-6 points).
- The timeline seems reasonable with no problem areas (7-10).



C. Spending plan

Explain how the funds will be allocated. The planning for this project has been completed. No costs are associated with the planning phase

D. Tangible and/or Intangible Benefits

Respond to the following and transfer data to the **Planning Financial Benefit Worksheet, # 5 below and the Execution Financial Benefit Worksheet, # IV E3, as necessary:**

1. One Year Pre-Project Cost - This section should be completed only if state government operations costs are expected to be reduced as a result of project Execution. **Quantify actual state government direct and indirect costs** (personnel, support, equipment, etc.) associated with the activity, system or process prior to project Execution.

Describe One Year Pre-Project Cost:

N/A - no change in government costs expected

Quantify One Year Pre-Project Cost:

	State Total
FTE Cost(salary plus benefits): Jodi Evans, 15% time one year	\$16,700
Support Cost (i.e. office supplies, telephone, pagers, travel, etc.): N/A	\$ 0
Other Cost (expense items other than FTEs & support costs, i.e. indirect costs if applicable, etc.): N/A	\$ 0
Total One Year Pre-Project Cost:	\$16,700

2. One Year Post-Project Cost - This section should be completed only if state government operations costs are expected to be reduced as a result of project Execution. **Quantify actual state government direct and indirect**

costs (personnel, support, equipment, etc.) associated with the activity, system or process after project Execution.

Describe One Year Post-Project Cost: same as pre-project. The Museum Registrar will continue to manage the museum collections.

Quantify One Year Post-Project Cost: increase in citizen access to museum collection information

	State Total
FTE Cost(salary plus benefits): Jodi Evans, 10% time one year	\$8350
Support Cost (i.e. office supplies, telephone, pagers, travel, etc.):	\$ 0
Other Cost (expense items other than FTEs & support costs, i.e. indirect costs if applicable, etc.):	\$ 0
Total One Year Post-Project Cost:	\$8350

3. One Year Citizen Benefit - Quantify the estimated one year value of the project to Iowa citizens. This includes the "hard cost" value of avoiding expenses ("hidden taxes") related to conducting business with State government. These expenses may be of a personal or business nature. They could be related to transportation, the time expended on the manual processing of governmental paperwork such as licenses or applications, taking time off work, mailing, or other similar expenses. As a "rule of thumb," use a value of \$10 per hour for citizen time.

Describe savings justification: Iowa citizens will have more control over information access. Information searches can be performed electronically which saves time and money in travel costs. Staff research time expenditures are reduced, as are expenditures in mailing collection research results.

<u>Transaction Savings</u>	
Number of annual online transactions:	78,000
Hours saved/transaction:	.75 per hour
Number of Citizens affected:	78,000+
Value of Citizen Hour	\$10
Total Transaction Savings:	\$58,500
Other Savings (Describe)	\$0
Total One Year Citizen Benefit :	\$58,500

4.

Opportunity Value/Risk or Loss Avoidance - Quantify the estimated one year non-operations benefit to State government. This could include such items as qualifying for additional matching funds, avoiding the loss of matching funds, avoiding program penalties/sanctions or interest charges, avoiding risks to health/security/safety, avoiding the consequences of not complying with State or Federal laws, providing enhanced services, avoiding the consequences of not complying with enterprise technology standards, etc

Response: No quantifiable monetary value to non-operational benefit. The real benefit comes from enhancement of museum operations, catching up to current museum collection management standards, and allowing the State Museum to be a role-model for Iowa museums.

5. Planning Phase Cost Calculation

On a fiscal year basis, enter the **estimated** cost by funding source: Be sure to include developmental costs and ongoing costs, such as those for hosting the site, maintenance, upgrades, etc., during the **Planning Phase**.

	Current FY		Current FY +1		Current FY +2	
	Cost(\$)	% Total Cost	Cost(\$)	% Total Cost	Cost(\$)	% Total Cost
State General Fund	\$33,400	100%	\$0	0%	\$0	0%
Pooled Tech. Fund /IOWAccess Fund	\$0	0%	\$0	0%	\$0	0%
Federal Funds	\$0	0%	\$0	0%	\$0	0%
Local Gov. Funds	\$0	0%	\$0	0%	\$0	0%
Grant or Private Funds	\$0	0%	\$0	0%	\$0	0%
Other Funds (Specify)	\$0	0%	\$0	0%	\$0	0%
Total Project Cost	\$33,400	0%	\$0	0%	\$0	0%
Non-Pooled Tech./Non-IOWAccess Total	\$0	0%	\$0	0%	\$0	0%

6. Planning Financial Benefit Worksheet

A. Total One Year Pre-Project cost (Section III D1): Jodi Evans @ 15%	\$16,700	
B. Total One Year Post-Project cost (Section III D2): Jodi Evans @10%	\$8350	
C. State Government Benefit (= A-B):		\$ 8350
D. One Year Citizen Benefit (Section III D3):		\$ 58,500
E. Opportunity Value or Risk/Loss Avoidance Benefit (Section III D4):		\$ 0
F. Total Planning Benefit (C+D+E)	\$ 66,850	
G. Planning Phase Cost Calculation (Section III D5):	\$ 33,400	
Benefit / Cost Ratio: (F/G) =	2	
Return On Investment (ROI): ((F-G) / Requested Project Funds) * 100	165.30	

6.

Benefits Not Readily Quantifiable - List and summarize the overall non-quantifiable benefits (i.e., IT innovation, unique system application, utilization of new technology, hidden taxes, improving the quality of life, reducing the government hassle factor, meeting a strategic goal, etc.).

Response: Meets stated strategic goal; Utilization of new tech; replacement of legacy systems; reduces hassle factor for people searching for collection information; creates consistency in 'look' of collection of management; reduces information formats.

[This section to be scored by application evaluator.]

Planning Financial Evaluation (15 Points Maximum)

- The financial analysis contains several questionable entries and provides minimal financial benefit to citizens (0-5 points).
- The financial analysis seems reasonable with few questionable entries and provides a moderate financial benefit to citizens (6-10 points).
- The financial analysis seems reasonable with no problem areas and provides maximum financial benefit to citizens (11-15).



Part IV – Execution Funding

Amount of Execution Funding Requested: \$17,235

Amount of Hosting Requested: \$ 3000 (\$250 x 12)

Note: Projects developed by DAS-ITE allow first year of hosting charges

A. Timeline

Provide a projected timeline for the Execution phase of the project. Include such items as **start date**, coding, testing, deployment, conversion, parallel installation, and **projected date of final release**. Also include the parties responsible for each item.

Response: The CMS is already developed. The timeline lists actions needed to (1) commit to PastPerfect as the CMS for museum collection information and, (2) create the on-line catalog accessible to the citizens of Iowa.

Jan 2010

Purchase PastPerfect. Install PP, and convert existing database to PP. (Registrar, DCA-IT)

Scan existing collection images, begin uploading these images to PP. (Registrar and museum staff)

Test and edit PP application. (Registrar)

Develop photography priority list. (Registrar and museum staff)

Introduce network users to PP. (Registrar, DCA-IT)

Read training manual and follow tutorials. (All network users)

Feb 2010

Continue uploading and editing. (Registrar, staff, volunteers)

Begin new photography from priority list and upload. (registrar, volunteers)

Design online catalog. (Registrar, DCA-IT, webmaster, IOWAccess)

Have 2-3 user meetings to discuss PP functions. (all network users)

March 2010

Create links between SHSI website and online catalog. (Registrar and DCA webmaster)

Create user feedback opportunity to refine functionality of online catalog. (Registrar, DCA-IT, webmaster)

Launch online catalog. (Webmaster, IOWAccess, DCA-PR)

Develop new cataloging procedure incorporating PastPerfect functions. (Registrar)

April 1, 2010

Stop using MS-ACCESS completely and commit to PastPerfect. (all network users)

Ongoing

Continue to redefine on-line catalog based on user feedback. (Registrar, staff)

Continue to coach network users in PastPerfect functions. (Registrar)



Execution Timeline Evaluation (10 Points Maximum)

- The timeline contains several problem areas (0-3 points).
- The timeline seems reasonable with few problem areas (4-6 points).
- The timeline seems reasonable with no problem areas (7-10).

B. Execution Funding Requirements

On a fiscal year basis, enter the **estimated** cost by funding source: Be sure to include developmental costs and ongoing costs, such as those for hosting the site, maintenance, upgrades, etc., during the **Execution Phase**.

	Current FY		Current FY +1		Current FY +2	
	Cost(\$)	% Total Cost	Cost(\$)	% Total Cost	Cost(\$)	% Total Cost
State General Fund	\$53,310	72%	\$41,750	100%	\$8350	100%
Pooled Tech. Fund /IOWAccess Fund	\$20,235	28%	\$0	0%	\$0	0%
Federal Funds	\$0	0%	\$0	0%	\$0	0%
Local Gov. Funds	\$0	0%	\$0	0%	\$0	0%
Grant or Private Funds	\$0	0%	\$0	0%	\$0	0%
Other Funds (Specify)	\$0	0%	\$0	0%	\$0	0%
Total Project Cost	\$73,545	100%	\$41,750	100%	\$8350	100%
Non-Pooled Tech./Non-IOWAccess Total	\$53,310	100%	\$41,750	100%	\$8350	100%

[This section to be scored by application evaluator.]

Execution Funding Evaluation (10 Points Maximum)

- The funding request contains questionable items (0-3 points).
- The funding request seems reasonable with few questionable items (4-6 points).
- The funding request seems reasonable with no problem areas (7-10).



C. Project Budget Table

It is necessary to estimate and assign a useful life figure to each cost identified in the project budget. Useful life is the amount of time that project-related equipment, products, or services are utilized before they are updated or replaced. In general, the useful life of hardware is three (3) years and the useful life of software is four (4) years. Depending upon the nature of the expense, the useful life for other project costs will vary between one (1) and four (4) years. On an exception basis, the useful life of individual project elements or the project as a whole may exceed four (4) years.

The Total Annual Prorated Cost (State Share) will be calculated based on the following equation:

$$\left[\left(\frac{\text{Budget Amount}}{\text{Useful Life}} \right) \times \% \text{ State Share} \right] + (\text{Annual Ongoing Cost} \times \% \text{ State Share}) = \text{Annual Prorated Cost}$$

Budget Line Items	Budget Amount (1 st Year Cost)	Useful Life (Years)	% State Share	Annual Ongoing Cost (After 1 st Year)	% State Share	Annual Prorated Cost
Agency Staff	\$53,310	5	100%	\$8350	100%	\$19,012
Software	\$4235	4	100%	\$600	100%	\$16,518
Hardware	\$13,000	3	100%	\$0	100%	\$4,333
Training	\$0	0	0%	\$0	0%	\$0
Facilities	\$0	0	0%	\$0	%	\$0
Professional Services	\$425	1	100%	\$600	100%	\$1,025
ITE Services	\$3000	1	100%	\$2500	100%	\$5,500
Supplies, Maint., etc.	\$0	0	0%	\$0	0%	\$0
Other	\$0	0	0%	\$0	0%	\$0
Totals	\$73,970	14	100 %	\$12,050	100 %	\$17,333

D. Spending plan

Explain how the funds will be allocated.

Purchase	Description	Estimated Cost
Canon EOS Rebel 55 mm	Create digital images	1,000
HP scanner	Create digital assets	500
Server	store object images and information	6,000
Server Software	Server	2,000
Computers	Registrar	1,500
Computer upgrades	Other staff	2,000
TOTAL		13,000
Past Perfect		
Past Perfect basic	Integrated content management.	900
PP Version 4.0 upgrade	Necessary for current version	200
Network Upgrade 6-11 users	Necessary for multiple users	900
Multimedia/Imaging	Power to attach and display one or more images of each record. Works with scanners and digital cameras.	400
Scatter/Gather	Allows information to be scattered to portable mechanisms (disk, zip, CD) then gathered from the mechanism to the main CMS	350
Past Perfect On-line	Selects and creates a fully searchable online catalog. Creates and submits site map to Google for indexing. Delivers visitation reports.	500
Data Conversion	No need to re-key data. \$50/hour	500
First Year Support	Network users	425
Annual Tech support	Network users	[600] Annual cost, not counted in total
Users Guide		20

Training CD		40
TOTAL		4,235

E. Tangible and/or Intangible Benefits

Respond to the following and transfer data to the Execution Financial Benefit Worksheet, #3 below, as necessary:

1. Opportunity Value/Risk or Loss Avoidance – Quantify the estimated annual non-operations benefit to State government. This could include such items as qualifying for additional matching funds, avoiding the loss of matching funds, avoiding program penalties/sanctions or interest charges, avoiding risks to health/security/safety, avoiding the consequences of not complying with State or Federal laws, providing enhanced services, avoiding the consequences of not complying with enterprise technology standards, etc.

Response: No quantifiable monetary value to non-operational benefit. Without a CMS the museum will continue to operate adequately. The real benefit comes from enhancement of museum operations, catching up to current museum collection management standards, and allowing the State Museum to be a role-model for Iowa museums.

2. Benefits Not Readily Quantifiable – List and summarize the overall non-quantifiable benefits (i.e., IT innovation, unique system application, utilization of new technology, hidden taxes, improving the quality of life, reducing the government hassle factor, meeting a strategic goal, etc.).

Response: In the region of mid-western states, most state museum have a CMS in place. Use of CMS will place the State Museum in-line with expected practices. The use of a recognized CMS will be a benefit in grant applications, demonstrating to grantors that the State Museum is ready to use new technologies in the care and interpretation of the state's historical resources.

The main goal of this project is to get museum collection information into the hands of the people of Iowa using electronic capabilities. Allowing individuals access to museum collection information at their leisure is a stated goal of the SHSI Mission Statement. Using a recognized CMS to manage the museum collection and build an on-line catalog is the most efficient means to that end.

3. Execution Financial Benefit Worksheet – Copy items A through F from Part III (Planning Phase), Section III D6; item G is from Section IV C, above.

A. Total One Year Pre-Project cost (Section III D1):	\$16,700	
B. Total One Year Post-Project cost (Section III D2):	\$8350	
C. State Government Benefit (= A-B):		\$ 8350
D. One Year Citizen Benefit (Section III D3):		\$58,500
E. Opportunity Value or Risk/Loss Avoidance Benefit (Section III D4):		\$0
F. Total Planning Benefit (C+D+E)	\$66,850	
G. Annual Prorated Cost (From Budget Table, Section IV C):	\$17,333	
Benefit / Cost Ratio: (F/G) =	3.85	

Return On Investment (ROI): $((F-G) / \text{Requested Project Funds}) * 100$	244.71	
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[This section to be scored by application evaluator.]

Execution Financial Evaluation (15 Points Maximum)

- The financial analysis contains several questionable entries and provides minimal financial benefit to citizens (0-5 points).
- The financial analysis seems reasonable with few questionable entries and provides a moderate financial benefit to citizens (6-10 points).
- The financial analysis seems reasonable with no problem areas and provides maximum financial benefit to citizens (11-15).



Evaluation Summary

[This section to be completed by application evaluator.]

Planning Phase:

Requirements/Compliance Evaluation (15 Points Maximum)	<input type="checkbox"/>
Impact Evaluation (15 Points Maximum)	<input type="checkbox"/>
Customer Service Evaluation (10 Points Maximum)	<input type="checkbox"/>
Scope Evaluation (10 Points Maximum)	<input type="checkbox"/>
Funds Evaluation (5 Points Maximum)	<input type="checkbox"/>
Reengineering Evaluation (10 Points Maximum)	<input type="checkbox"/>
Planning Timeline Evaluation (10 Points Maximum)	<input type="checkbox"/>
Planning Financial Evaluation (15 Points Maximum)	<input type="checkbox"/>
<u>TOTAL PLANNING EVALUATION</u> (90 Points Maximum)	<input type="checkbox"/>

Execution Timeline Evaluation (10Points Maximum)	<input type="checkbox"/>
Execution Financial Evaluation (15 Points Maximum)	<input type="checkbox"/>
Execution Funding Evaluation (10 Points Maximum)	<input type="checkbox"/>
<u>TOTAL EXECUTION EVALUATION</u> (35 Points Maximum)	<input type="checkbox"/>

Execution Phase:

Part V – Auditable Outcome Measures

For each of the following categories, list the auditable metrics for success after Execution and identify how they will be measured.

1. Improved customer service

Response: Citizens able to access museum collection information measured by how many hits on website and how long a visitor browses.

2. Citizen impact

Response: Fewer complaints regarding disposition of older museum collections measured by decline in these types of inquires at museum information desk, and by letter, email and phone.

3. Cost Savings

Response: Increase in citizen access without increase in overall museum costs measured over 5 years.

4. Project reengineering

Response: Greater efficiency in managing museum collections resulting in a reduction of time needed to post content online.

5. Source of funds (Budget %)

Response: IOWAccess funds for 1st year execution phase (100%)

6. Tangible/Intangible benefits

Response:

Tangible:

Increased online visits and browsing;

Increased citizen access to state government;

Greater citizen understanding of museum collections;

Intangible:

Greater transparency in state museum operations;

Increased perceived value of museum and collections;

Increased value of State Museum to citizens;

Increased status for State Museum among Iowa museums and on national scale.